Success is a Choice Mentor Programme

Workshop Plan Module Three Workshop Three

Target Group: New Entrants to the Mortgage Broking Industry
Module No/Workshop Series: Module 3 Workshop 3
Learning Outcome: At the end of this Workshop, mentees should be able to: ❑ Recap the case studies ❑ Do the short form business plan review ❑ Develop marketing ideas to build the business ❑ Set Business goals for next 7 and 30 days using the short form review ❑ Create a time management planner for a week ❑ Complete Case study six
Assessment Criteria: as per Mentor Checklist ❑ Role plays ❑ Case study review ❑ Completed Time Management Planner for One Week ❑ Completed Business Plan

Resources: **Equipment:** Data Projector, Whiteboard, Flip chart, laptops, **Guest Presenter options:**
Expected Time: 6 hours including breaks
OHS **It is important for you as the mentor when you set up your training session to cover OHS.** **You need to do this at the beginning of each session- you have a duty of care to anyone that you train to explain to them** • **Where the emergency exits are** • **Where the toilets are** • **What to do in an emergency** **You are also responsible for making sure that the learning environment is safe. So that means you don't conduct any of your sessions in any area that might be unsafe including the use of any resources that are not safe. E.g. Frayed electrical cords or extension cords running across the floor/trip hazards** **Session** **This session you go over the short form business review and 50 ideas for marketing and building the business.**

This is a less content filled session so that you can invite speakers and also give the mentee time to catchup on anything they need to. This also means that you can spend time with others on individual needs as required. The other sessions have been quite full so they will enjoy having more time to ask questions about the learning so far. Review all the templates provided and make sure that they are using them.
We will look at the checklist once again and the loan checklist for a loan. Even though they will have put a loan together with the case study, you need to reinforce the checklist as this is their saviour with every loan.

They will walk through each section with you. You do not need to be an expert, as it is written clearly for them (and you) to read and then create discussion. Make sure you have read the section or the exercise first as then it is easier for you to guide them through it.
Their weekly plan will help you to see where they are spending their time. This is so you can keep them on track. They should email you this on a Monday and then you review with them at the end of the week or the following Monday.
Case study:
Have them read through and question you as to the path to take, then they can spend some time researching it.
If they are not set up on your aggregator software as yet, then get them to look at the bank websites. Doing this will also show them how the customer does it and how frustrating it can be to go site to site. There are two case studies in each module and the mentee needs to tell you what research they have done so that you can see that they understand the process. So read through the scenario and the instructions and get the conversation started.

The case study is the last thing that is covered for the day so that it is easier to remember and they are not distracted by it earlier in the day. If you give it to them too early then they will be thinking about that and not the task you are working on. **Finish the session with goal setting and what the next session will be about. If you need to; schedule some one on one time with those who need it.** **Always finish each session with goal setting and what are they going to Stop, Continue and Start doing. This is their opportunity to show you that they are growing and managing their own performance.**
Notes: **Access templates as required from your Simply Mentoring USB**

Time	**Topic**	**Main Points/Activity**	**Resources**
10am- 10.15	Welcome	Welcome them back and go over what the day's session will hold as above in your briefing. Remind them to turn phones to silent	
10.15-10.25	Record keeping	Get everyone to sign The	

		attendance log (you create) Update where they are with their accreditations- (if they have started) enter into log	Attendance log that you have created
10.25- 10.45	Checklists	Go through the checklists for Module Three and make sure they are on track to completing each item Discuss 'negotiables' and non 'negotiables' in client contact. • e.g.: speed of returning all calls, level of literacy required in written communication; how emails should be constructed – no short sharp responses; how to make the customer	End of Module

		feel like they are your only customer; It may seem simple however leave nothing to chance. Ensure that the new broker understands that they should 'begin as they mean to end' If they want to end up as a professional, they should begin all activities as a professional	
10.45am Break for a cuppa			
11am-12	Recap of last sessions	Recap all of the session so far. Particularly Module one because it is full of behaviours. Do a check as to how they feel their "style" is fitting in with broking. It is a	Their module

		very sales focused role so do they need any assistance. This is a good gauge for you to see where they are in their confidence and product knowledge.	
12-12.30	Build your Business	Get them to look at the activity in the module. Answer the questions as best they can. This assists with completing their weekly plan. Mentees can have quite a shot gun approach so this helps to bring the focus back.	Their manual
12.30 lunch Break		Get them to change their outgoing message on their mobile phones to something industry relevant	
1pm – 1.30pm	Lender guest		Mentee manual

			Lender question template
1.30 –2.30	50 ideas for marketing and building the business	Read through and have the mentees highlight the ones that they like the best and then have them transfer these to another list and then give each one a time frame to fit in with the next section of goal setting. .	Laptops and internet access Highlighters
2.30 -2.45	Review Goal Setting Time Management	Review their immediate, 7 day and 30 day goals Get them to be always thinking about where the business is going to come from. Get them to complete the template and the weekly plan	Mentee Manual Template on USB and in their module

2.45pm Break for a cuppa			
3.00	Case Study review	Review all the case study's so far and ensure that the mentee can teach you what to do for each one. You want them demonstrating that they understand the scenario and would be confident in interviews so far. They need to use you as the customer or each other to practice their interviewing skills Give them time with you to do a role play.	Mentees to have their case studies form the modules so far Case Study One to Six
4pm	Goal setting /expectations	What are their expectations going forward What are your expectations (of yourself and your mentee)	Module checklist double check on track

		Quick review of the day and where do they need clarification of what was covered today What do they need to: Stop doing  Start doing  Continue doing  Thank them for coming today Confirm date and times for next session End of session	